



Office of the Mayor-President

Purchasing Division

City of Baton Rouge
Parish of East Baton Rouge
300 North Boulevard, Rm 309
P. O. Box 1471
Baton Rouge, Louisiana 70821

225/389-3259 FAX 225/389-4841
purchasinginfo@brgov.com

Addendum #4

December 10, 2009

RE: R09-008 Financial Literacy Training and Individual Financial Counseling

The following shall become part of the Request for Proposal, Special Conditions and Specifications as if originally included. The following clarifications/changes/ etc. are provided:

QUESTIONS

Question: Would the provider(s) have to recruit additional participants if the projected number of 100 participants is not met?

Answer: No, the Office of Social Services (OSS) will recruit all participants.

Question: If other persons are interested in this program, should they be referred to the OSS?

Answer: Yes, but interested persons must meet the Federal Income Guidelines established for this program.

Question: Have the Adult Basic Education and GED Preparation Program and Job Readiness training/Job Search Assistance/Job Placement programs begun?

Answer: No.

Question: Will all participants enter other programs first? How soon will the Financial Literacy portion of the program begin?

Answer: Financial Literacy will begin immediately after the funding is received by the OSS and the contract(s) have been fully executed. Participants will be enrolled in specific components based on their most compelling needs and may be enrolled in multiple components simultaneously.

Question: Will the provider(s) be required to meet with the participant every week for 2 hours or can the training be scheduled in several meetings per months, as long as the required number of hours is met?

Answer: The provider may conduct instruction and training on a schedule (weekly, bi-weekly, or monthly) that meets the required level of assistance. At a minimum, the program schedule must have at least 2 hours of education for each component area in which the participant has demonstrated a need as identified during the assessment process.

Question: Does training have to begin immediately after assessment of the participant?

Answer: No. However, if training will not begin within two (2) weeks of assessment, OSS should be notified in writing of the reason for the delay. Also, the provider should document the tentative training schedule for the participant.

Question: Can participants be given assistance in other areas such as completing financial aid forms to attend school?

Answer: Yes, OSS written authorization. Applicant(s) should include in their proposal all services that they are able to provide to assist the participant become financially self-sufficient. A request to provide services outside of the components listed on page 22 of the RFP must be submitted in writing and approved by the OSS prior to the provision of additional services.

Question: Are providers required to have five (5) years of Financial Literacy Education as stated on page 3 of the proposal?

Answer: Yes.

Question: Will program literature be provided by OSS or will the provider(s) be able to supply the needed literature?

Answer: No. The provider(s) will supply all needed literature.

Question: Based on the start date of the program will the vendor(s) still be required to provide services to the projected number of participants?

Answer: The number of participants to be served will be modified based on the actual start date of the program as approved by CSBG.

Question: Will reports from the provider(s) be submitted monthly or quarterly?

Answer: Providers will be required to submit performance reports on a monthly and quarterly basis. The OSS will inform providers, in writing, of the reporting requirements and schedule.

Question: Will the vendor(s) be allowed to collaborate with one another?

Answer: Yes, the OSS encourages collaboration amongst providers, agencies and community partners to best meet the needs of the participants.

OTHER IMPORTANT INFORMATION

Applicants are asked to submit a line item budget which includes a per client cost.

Resumes must be submitted on all staff that will provide services under this contract.

Providers should submit a copy of its last audit.

Per Attachment C of the RFP (p. 28) the City of Baton Rouge and Parish of East Baton Rouge must be named as additional insured on all general liability policies described within the attachment.

CORRECTIONS

(p. 22, paragraph 1, line 3)

...at a minimum, the program schedule must have at least 2 hours of education for each component area in which the participant has demonstrated a need as identified during the assessment process. For each participant, an individual financial plan and tentative training schedule must be submitted to and approved by the OSS prior to the provision of services.

(p. 22, paragraph 3)

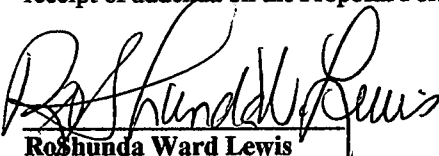
The program shall include the following components (modules) and their ultimate educational goals:

- Banking Services – Participants will understand available banking services and how to build a positive relationship with a financial institution.
- Credit Basics – Participants will understand how credit works and if they are ready to apply for credit.
- Checking Accounts – Participants will understand how to use a checking account responsibly.
- Spending Habits – Participants will understand how to manage money by preparing a personal spending plan and identify ways to decrease spending and increase income. **Participants will also understand how to make sound decisions based on personal financial goals.**
- Savings – Participants will understand ways to save money and saving options to save toward their goals.
- Personal Finances – Participants will understand how to protect their finances and identity.

The program **may also include, but is not limited to**, the following components (modules) and their ultimate educational goals:

- Credit Reports – Participants will understand how to read a credit report and how to build and repair their credit history.
- Credit Cards – Participants will understand credit cards and how to responsibly use them.
- Loans – Participants will understand general information on installment loans, including car loans and home equity loans.
- Home Purchase – Participants will understand information on the steps involved in buying a house.

This Addendum No. 4 supersedes any conflicting parts of the original proposal documents. Proposers are reminded to acknowledge receipt of addenda on the Proposal Form. Proposals may be declared non-responsive for non-acknowledgement of addenda.


Roshunda Ward Lewis
Administrative Specialist II

Firm: _____

Signature: _____

Title: _____

Address: _____

City

State

Zip Code